Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Voluntary Report - public distribution

Date: 7/10/2002

GAIN Report #CA2078

Canada

Fishery Products

Canadian Seafood Industry

2002

Approved by:
Hugh Maginnis
U.S. Embassy
Prepared by:
L.B.C. Consulting Services, Montreal, Quebec

Report Highlights:
Canada's seafood imports are growing at a compound annual rate of 6.5% and are forecast to reach nearly 600,000 MT in 2002. The U.S. is the largest single supplier, accounting for 38 percent by volume and 45 percent by value, of total Canadian seafood imports.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Ottawa[CA1], CA

CANADIAN SEAFOOD INDUSTRY

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CANADIAN SEAFOOD INDUSTRY

OVERVIEW

Canada's Seafood Industry has evolved as a consequence of this Country's ability to harvest far more fish and seafood than its citizens can consume. Inasmuch as fish and seafood must be processed quickly and efficiently to avoid spoilage, Canada has developed a disproportionately large processing infrastructure that is capable of handling seasonal peaks in fish and seafood landings, as well as an efficient apparatus for exporting. Latterly, the Country's demand for fish and seafood has become processor-driven, with imports serving to keep the processing plants operating during periods when domestic supply is reduced. Furthermore, with only a small home market to satisfy, Canada has been able to build export markets for a mix of products which is skewed towards the more expensive fish and seafood species and value-added products.

Key Comparisons and Indicators	U.S.A.	Canada
Approximate Currency Exchange (May, 2002)	USD 1.00	CAD 1.50
Basic Comparative Indicators		
Population (Millions)	287	31
Area (Millions of Square Km)	9.6	10
Water Area (Thousands of Square Km)	470	755
Coastline (Thousands of Km)	20	244
Landings (Year 2000, Millions of Tonnes)	4.1	1.1
Fishing Vessels (Thousands)	67	24
Auction	Yes	No
Per Capita Seafood Consumption (Kg)	7.1	11
Processing Plants / Wholesalers, etc		
Number of Companies	4,575	858
Number of Employees (Thousands)	85	69
Revenues (2002 FC, $ billion)	USD 28.0	CAD 9.5
Domestic Seafood Sales (USD Billions)	USD	CAD
Retail Outlets	16.4	2
Food Services	35.6	4.1
Industrial	0.4	0.1
Total	52.4	6.2
Import / Export (Year 2001,Thousands of Tonnes)		
Imports	1,950	575
Exports	1,425	548
Import / Export (Year 2001, Millions of Dollars)	USD	CAD
Imports	10,200	2,171
Exports	3,200	4,212

MARKET SUMMARY

Canada's Seafood Harvest

Based on data from 1997 through present, Canada's seafood harvest is growing at a compound annual rate (CGR) of 3% and is forecast to reach nearly 1.25 million tonnes this year. The comparable figures in dollars, which represent revenues to fishermen and aqua-culturists, are 8.1% and **Cdn. $3.1 billion**:

	Tonnes	CGR %	CAD 000	CGR %
Saltwater Fishing	1,051,042	2.1%	$2,303,931	6.9%
Freshwater Fishing	42,432	1.7%	$95,545	5.7%
Aquiculture	150,204	13.0%	$741,338	13.3%
Total	**1,243,678**	**3.0%**	**$3,140,814**	**8.1%**

Shellfish, including lobster, dominate the harvest in both tonnes and dollars. The Fish NES[1] and Miscellaneous categories show significant percentage growth and decline trends respectively; but since these two categories represent only 2% of the total harvest in tonnes to begin with, the compound annual growth percentages can be misleading:

	Tonnes	CGR %	Cdn$ 000	CGR %
Groundfish	244,815	-1.8%	$378,651	8.9%
Pelagic Seafish	384,568	1.3%	$675,701	3.8%
Shellfish	529,055	8.1%	$1,869,597	10.2%
Freshwater Fish	58,868	4.2%	$177,097	9.0%
Fish NES	1,862	-18.0%	$7,505	35.6%
Miscellaneous	24,711	104.4%	$32,264	5.4%
Total	**1243825**	**3.0%**	**$3,140,814**	**8.1%**

The Miscellaneous category does contain fish meal, consumption of which has been growing in parallel with Canada's aquiculture efforts.

The distribution of the harvest by harvesting method for the Year 2002 (Forecast) is depicted in the following Table:

	Aquiculture		Capture Fishery	
	Tonnes	Cdn$ 000	Tonnes	Cdn$ 000
Groundfish	0.0%	0.0%	100.0%	100.0%
Pelagic Seafish	25.0%	89.0%	75.0%	11.0%
Shellfish	7.0%	3.0%	93.0%	97.0%
Freshwater Fish	28.0%	46.0%	72.0%	54.0%
Total	**12.0%**	**24.0%**	**88.0%**	**76.0%**

[1] Not Elsewhere Specified

By weight, Canada's Atlantic Fisheries account for about 80% of this Country's seafood harvest, the Pacific Fisheries for 16%, and the Landlocked Provinces[2] for 4%. By value, the Atlantic Fisheries account for 75% of the harvest, the Pacific Fisheries 21%, and the Landlocked Provinces again represent 4%.

In terms of trends, the Pacific Fisheries catch (tonnes) has been declining at a compound annual rate of 5.2% since 1997, due primarily to regulatory action intended to ensure a sustainable fishery into the future. By contrast, the Atlantic Fisheries catch (tonnes) has increased during the same period at a compound annual rate of 5.7%. Note that regulatory action to ensure a sustainable fishery was taken earlier in Atlantic Canada than in Pacific Canada, and that the Atlantic Fisheries harvest has seen modest growth - that is in part related to recovery from previous over-fishing - since 1997. The Atlantic Provinces have also bolstered their harvest through aquiculture of salmon, shellfish, and freshwater fish; and have developed a nascent capture fishery for freshwater fish.

The contribution of the individual Provinces to Canada's seafood harvest (in tonnes and dollars) is presented in the following Table:

Tonnes (1.25 million)				**Value (Cdn$ 3.1 billion)**		
Rank	%	CGR %	**Province**	Rank	%	CGR %
1	27.6%	9.9%	NF	2	24.8%	18.1%
2	26.9%	3.0%	NS	1	25.8%	9.3%
3	15.7%	-5.2%	BC	3	21.3%	2.5%
4	13.1%	4.4%	NB	4	12.6%	6.1%
5	7.9%	7.4%	PE	5	6.4%	9.7%
6	5.2%	3.3%	QC	6	5.4%	4.0%
	3.6%	1.9%	Others		3.7%	6.7%
	100.0%	3.0%	**Total**		100.0%	8.1%

[2] Includes Ontario, Manitoba, Saskatchewan, and Alberta. Strictly speaking, neither Ontario nor Manitoba is a "landlocked" Province, since they border on Hudson Bay.

Canada's Seafood Imports

Based on data from 1997 through present, Canada's seafood imports are growing at a compound annual rate of 6.5% and are forecast to reach nearly **600 thousand tons** this year. The comparable figures in dollars are 8.6% and **Cdn $ 2.4 billion**.

The sources of Canada's seafood imports by Country (or group of Countries) are presented in the following Table:

Tonnes (600,000)				**Value (Cdn$ 2.4 billion)**		
Rank	%	CGR %	**Country**	Rank	%	CGR %
1	38.0%	4.9%	USA	1	45.0%	11.1%
4	16.0%	-0.7%	Europe	3	16.0%	4.7%
2	25.0%	18.6%	C&S America	4	8.0%	5.1%
5	1.0%	-7.5%	Japan	5	1.0%	-9.9%
3	20.0%	10.0%	Rest-of-World	2	30.0%	10.2%
	100.0%	6.5%	**Total**		100.0%	8.6%

Canada's seafood imports by Species Group are:

Tonnes (600,000)				**Value (Cdn$ 2.4 billion)**		
Rank	%	CGR %	**Species Group**	Rank	%	CGR %
4	11.0%	-4.2%	Groundfish	1	14.0%	5.9%
3	17.0%	4.0%	Pelagic Seafish	3	17.0%	7.4%
2	30.0%	11.6%	Shellfish	4	49.0%	10.4%
5	2.0%	20.3%	Freshwater Fish	5	2.0%	29.1%
1	39.0%	8.6%	Fish, NES	5	16.0%	5.7%
6	1.0%	71.0%	**Miscellaneous**	2	2.0%	48.0%
	100.0%	6.5%	Total		100.0%	8.6%

The leading imports by weight and processing category are fresh/frozen shellfish and fish meal, which each represent approximately 22% of total imports by weight, and are growing at a compound annual rate of 12.0% and 16.1% respectively. Whole fresh or frozen dressed fish accounts for 17.3% of Canada's imports by weight. Interestingly, fresh whole fish imports are growing at a rate of almost 14% per year, whereas frozen whole fish is being imported at a declining rate (CGR -12.1%). Other major imports are Fish Oil and Canned Fish Products, which together account for 15.8% of imports. The fastest growing category by weight is pickled and cured fish imports, which though growing at a compound annual rate of 400%+, still represents only 2% of total imports by weight.

By value and processing category, the leading import is fresh/frozen shellfish, which at Cdn $1 billion, represents 44% of total imports. Fresh/frozen shellfish imports are growing at a compound annual rate of 9.9% (by value). Whole fresh or frozen dressed fish account for about 20% of imports by value. The value of fresh whole dressed fish imports is growing nearly 18% per annum, whereas the value of frozen whole dressed fish is declining by about (4.5%) per year. Canned Fish Products represent some 9% of the value of imports and the value of these imports is

increasing at a rate of almost 6% per year. The fastest growing categories by value are pickled and cured fish imports (245%), Fish Oil (46%) and Fresh Fish Filets (42%).

Imports by Province reflect a mix of products being imported for further processing and products imported finished for sale to consumers.

Tonnes (600,000)				**Value (Cdn$ 2.4 billion)**		
Rank	%	CGR %	**Province**	Rank	%	CGR %
4	10.1%	7.5%	NF	4	10.8%	11.7%
6	6.4%	-3.8%	NS	6	5.5%	0.9%
1	38.2%	10.7%	BC	1	29.1%	10.0%
3	14.4%	2.2%	NB	3	14.9%	7.6%
2	20.7%	7.6%	ON	2	27.5%	7.7%
5	6.5%	7.5%	QC	5	9.2%	10.7%
	3.7%	14.7%	Others		3.0%	24.7%
	100.0%	3.0%	**Total**		100.0%	8.1%

80:20 ANALYSIS OF IMPORTS FROM THE USA; TONNES

Rank	**Cum. %**	**Product Name**	**2002 FC Tonnes**	**Tonnes Cum.**	**%**	**Cum. %**
1	0.6%	Coral,Shells,Cuttlebone Crude/Simply Prepared	27092	27092	11.7%	11.7%
2	1.2%	Fish,Shellfish Products Unfit For Human Consumption	22,762	49854	9.8%	21.5%
3	1.9%	Lobster (Homarus Spp.) Live/Fresh/Dried/Salted/Brine	16,914	66,767	7.3%	28.8%
4	2.5%	Fish,Shellfish Meal Unfit For Human Consumption	13329	80097	5.7%	34.6%
5	3.1%	Sticks,Type Products Not Coated Of Minced	11,043	91,139	4.8%	39.3%
6	3.7%	Groundfish Cod Nspf Frozen	10,071	101,210	4.3%	43.7%
7	4.3%	Salmon Atlantic Fresh Farmed	9,974	111,184	4.3%	48.0%
8	4.9%	Salmon Nspf Canned Not In Oil	9,555	120,739	4.1%	52.1%
9	5.6%	Fish Nspf Fresh	9,265	130,004	4.0%	56.1%
10	6.2%	Fish Nspf Minced Frozen > 6.8kg	7,817	137,821	3.4%	59.5%
11	6.8%	Flatfish Halibut,Greenland Turbot Fresh	6,751	144,571	2.9%	62.4%
12	7.4%	Herring Fresh	6,714	151,285	2.9%	65.3%
13	8.0%	Crab Nspf Live/Fresh/Salted/Brine	6,502	157,787	2.8%	68.1%
14	8.6%	Salmon Sockeye Canned Not In Oil	5,443	163,230	2.3%	70.4%
15	9.3%	Fish Nspf Fillet Fresh	5,204	168,434	2.2%	72.7%
16	9.9%	Fish Nspf Fillet Frozen	4,596	173,030	2.0%	74.6%
17	10.5%	Fish Nspf Meat Frozen	4,270	177,300	1.8%	76.5%
18	11.1%	Fish Nspf Oil/Fractions	4,192	181,492	1.8%	78.3%
19	11.7%	Salmon Pink Fresh	3,490	184,982	1.5%	79.8%
20	12.3%	Herring Frozen	2,900	187,882	1.3%	81.0%
21	13.0%	Groundfish Cod Nspf Fresh	2,562	190,444	1.1%	82.2%
22	13.6%	Flatfish Halibut Atlantic,Pacific Frozen	2,269	192,713	1.0%	83.1%
23	14.2%	Mackerel Frozen	2,071	194,784	0.9%	84.0%
24	14.8%	Groundfish Cod Nspf Salted	1,893	196,678	0.8%	84.8%
25	15.4%	Tuna Nspf Fresh	1,782	198,460	0.8%	85.6%
26	16.0%	Tuna Albacore Frozen	1,700	200,159	0.7%	86.3%
27	16.7%	Shrimp Peeled Frozen	1,680	201,839	0.7%	87.1%
28	17.3%	Salmon Chum Frozen	1,676	203,515	0.7%	87.8%
29	17.9%	Molluscs Nspf Live/Fresh	1,643	205,159	0.7%	88.5%
30	18.5%	Shrimp Other Preparations	1,629	206,787	0.7%	89.2%

31	19.1%	Fish Nspf Frozen	1,439	208,226	0.6%	89.8%
32	19.8%	Squid Nspf Fillet Frozen	1,329	209,555	0.6%	90.4%
130	80.2%	All Others		22,265		9.6%
162	100.0%	**Grand Total**		231,820		100.0%

80:20 ANALYSIS OF IMPORTS FROM THE USA; Cdn$ 000

Rank	Cum. %	Product Name	2002 FC Value	Value Cum.	%	Cum. %
1	0.6%	Lobster (Homarus Spp.) Live/Fresh/Dried/Salted/Brine	$206,295	$206,295	19.5%	19.5%
2	1.2%	Salmon Atlantic Fresh Farmed	$75,264	$281,560	7.1%	26.6%
3	1.9%	Fish Nspf Fresh	$60,512	$342,072	5.7%	32.4%
4	2.5%	Flatfish Halibut,Greenland Turbot Fresh	$53,200	$395,272	5.0%	37.4%
5	3.1%	Sticks,Type Products Not Coated Of Minced	$49,860	$445,131	4.7%	42.1%
6	3.7%	Salmon Nspf Canned Not In Oil	$43,641	$488,772	4.1%	46.2%
7	4.3%	Fish Nspf Fillet Fresh	$40,684	$529,456	3.8%	50.1%
8	4.9%	Groundfish Cod Nspf Frozen	$40,216	$569,672	3.8%	53.9%
9	5.6%	Salmon Sockeye Canned Not In Oil	$38,847	$608,519	3.7%	57.6%
10	6.2%	Crab Nspf Live/Fresh/Salted/Brine	$26,481	$635,000	2.5%	60.1%
11	6.8%	Flatfish Halibut Atlantic,Pacific Frozen	$22,957	$657,957	2.2%	62.3%
12	7.4%	Molluscs Nspf Live/Fresh	$22,253	$680,210	2.1%	64.4%
13	8.0%	Fish Nspf Minced Frozen > 6.8kg	$22,200	$702,410	2.1%	66.5%
14	8.6%	Shrimp Peeled Frozen	$21,938	$724,347	2.1%	68.5%
15	9.3%	Fish Nspf Fillet Frozen	$17,693	$742,041	1.7%	70.2%
16	9.9%	Fish Nspf Meat Frozen	$17,647	$759,688	1.7%	71.9%
17	10.5%	Shrimp Other Preparations	$15,972	$775,659	1.5%	73.4%
18	11.1%	Scallops Live/Fresh	$15,109	$790,768	1.4%	74.8%
19	11.7%	Crab King Frozen	$14,453	$805,221	1.4%	76.2%
20	12.3%	Fish,Shellfish Products Unfit For Human Consumption	$14,241	$819,462	1.3%	77.5%
21	13.0%	Herring Fresh	$11,825	$831,288	1.1%	78.7%
22	13.6%	Fish,Shellfish Meal Unfit For Human Consumption	$11,344	$842,632	1.1%	79.7%
23	14.2%	Groundfish Cod Nspf Fresh	$10,367	$852,999	1.0%	80.7%
24	14.8%	Lobster (Homarus Spp.) Frozen	$9,193	$862,192	0.9%	81.6%
25	15.4%	Shrimp Shell-On Frozen 31/40	$8,900	$871,092	0.8%	82.4%
26	16.0%	Scallops Frozen/Dried/Salted/Brine	$8,521	$879,613	0.8%	83.2%
27	16.7%	Thickeners Derived From Vegetable Products (Kelp)	$8,185	$887,798	0.8%	84.0%
28	17.3%	Clam Nspf Prepared/Preserved	$7,915	$895,713	0.7%	84.8%
29	17.9%	Tuna Albacore Frozen	$7,543	$903,257	0.7%	85.5%
30	18.5%	Crab Snow Frozen	$7,308	$910,564	0.7%	86.2%
31	19.1%	Oysters Live/Fresh/Frozen/Dried/Salted/Brine	$6,689	$917,253	0.6%	86.8%
32	19.8%	Tuna Nspf Fresh	$6,652	$923,906	0.6%	87.4%
130	80.2%	All Others		$132,963		12.6%
162	100.0%	Grand Total		$1,056,869		100.0%

Canada's Seafood Exports to the United States

Canada will export about **385,00 tonnes** of seafood products to the United States in 2002. The value of these exports is expected to reach nearly **Cdn$ 3.5 billion**. A full analysis of Canada's most important exports to the United States, while beyond the scope of this Report, may well be warranted in order to uncover opportunities for U.S. companies to increase their domestic sales by targeting selected products that are imported from Canada. In summary, Canada's most important exports to the United States (representing 50% of same by weight), are fresh farmed Atlantic Salmon and Salmon filets, frozen Snow Crab, Seafood Products unfit for human consumption, live and frozen Lobster, live/fresh farmed Mussels, and fresh Haddock. By value, Canada's most important exports to the United States are frozen Snow Crab, live & frozen Lobster, fresh farmed Atlantic Salmon and filets, and cooked, frozen Lobster meat. These products account for nearly 60% of the value of

Canada's exports to the United States.

The Canadian Domestic Market

SOURCES & USES OF SEAFOOD PRODUCTS IN CANADA

Tonnes; 2002 FC	Fish Product Type			
	Dressed Fish	**Converted Fish**	**Fish By-Products**	**Total**
Canadian Domestic Fish Landings				1,243,678
1° PROCESSING STAGE				
Opening Position after Evisceration of Domestic Catch	897,525		346,153	1,243,678
(-) Exports of Whole Fish, Fresh or Frozen	(150,134)			
(=) Domestic Position after Entrail Removal & Exports	747,391			
(+) Imports of Whole Fish, Fresh or Frozen	103,649			
(=) Domestic Position after Entrail Removal & Imports	851,039		346,153	1,197,192
(±) Removal of Head, Tail, etc. (where applicable)	(212,760)		212,760	
(=) Domestic Position after 1° Processing	638,280		558,913	1,197,192
2° PROCESSING STAGE				
Opening Position before Triage & Converting	638,280		558,913	1,197,192
(±) Weight shift due toTriage	(95,742)		95,742	
Position after Triage	143,613	398,925	654,655	1,197,192
(-) Moisture & Other Losses during Converting		(79,785)	(621,922)	
(-) Exports of Shellfish & Converted Seafood Products		(338,901)	(60,037)	
(=) Domestic Position after Converting & Exports		(19,761)	(27,304)	
(+) Imports of Shellfish & Converted Seafood Products		258,065	238,026	
(=) Domestic Position after Triage & Converting	143,613	238,304	210,722	592,639
DOMESTIC DISTRIBUTION STAGE				
Opening Position before Distribution	143,613	238,304	210,722	592,639
(-) Distribution Losses	(14,002)	(23,235)	(20,545)	
(=) Sales at Retail	129,611	215,069	190,177	534,857

TRENDS IN CANADA'S RETAIL MARKETS

The Canadian retail market for seafood products is valued at approximately Cdn$ 6.2 billion. Food services accounts for about 2/3 of the market, with retail store sales of seafood products making up most of the balance:

	1997	2002 FC	CGR %
Population (000)	29,987	31,341	0.9%
Per Capita Seafood Consumption (Kg)	8.6	11	5.2%
Fish Tonnes Consumed	257,890	344,690	6.1%
Retail Fish Product Spending / Capita	$52.33	$64.30	
Retail (Cdn$ 000)	$1,569,149	$2,015,269	5.2%
Food Services (Cdn$ 000)	$2,446,506	$4,099,802	11.4%
By Products (Cdn$ 000)	$82,800	$92,992	2.4%
Yearly Retail Spending Total (Cdn$ 000)	$4,098,455	$6,208,063	8.9%

Per capita consumption of seafood (11.0 Kg) is comprised of Seafish, fresh and frozen (46%), Seafish, processed (25%), Shellfish (27%) and Freshwater fish (2%).

Since Canada imports a far greater volume of Fish & Seafood than its domestic market consumes[3], it is obvious that relatively little of what is imported from the United States (or elsewhere for that matter) ends up un-transformed on Canadian tables. For example, the largest volume of imports from the United States goes to Canadian lobster producers (mostly in New Brunswick), who spend over Cdn$ 200 million on lobster from Maine and the neighboring states. Groundfish is imported from Alaska for further processing and resale on the U.S. market, and 25% of the volume (and 2% of the value) of imports from the United States is meal used in the manufacture of livestock and fish feed and other "not for human consumption" products. In short, it is evident that Canadian fish & seafood processors (converters) are turning more and more to imports for their raw materials.

[3] 599,740 tonnes vs. 344,690 tonnes

The estimated distribution of U.S. imports (2002 FC) by destination is presented in the following Table:

	Purpose of Importation			
(Tonnes)	Further Processing	Domestic Consumption	Industrial Purposes	Total
Seafish, fresh & frozen	60,283	15,139	0	75,354
Seafish, processed	10,660	41,100	0	51,760
Shellfish	30,717	14,286	0	45,003
Freshwater Fish	0	816	0	816
Other	0	0	58,888	58,888
Total	101,660	71,341	58,888	231,820

The following Table summarizes the implications of the foregoing data as regards U.S. products' share of domestic consumption:

	Domestic Consumption	Imports from U.S.	U.S. Market Share
Seafish, Fresh & Frozen	160,028	15,139	9%
Seafish, processed	87,724	41,100	47%
Shellfish	91,359	14,286	16%
Freshwater Fish	5,579	816	15%
Total	344,690	71,341	21%

The estimated Canadian domestic consumption of fish & seafood products (tonnes) can be further broken down as follows:

Canada Domestic Consumption	Fresh, Whole	Filets, Steaks	Fish Sticks/ Portions	Shellfish (except canned)	Canned Seafood Products	Cured Seafood Products	Total
Seafish, fresh & frozen	85,015	75,013	0	0	0	0	160,028
Seafish, processed	0	0	19,937	0	60,809	6,978	87,724
Shellfish	0	0	0	82,422	8,937	0	91,359
Freshwater Fish	5,579	0	0	0	0	0	5,579
Total	90,594	75,013	19,937	82,422	69,746	6,978	344,690

The following Table summarizes the U.S. market share implications:

(Tonnes)	Domestic Consumption	Imports from U.S.	U.S. Market Share
Fresh, Whole	90,594	15,954	18%
Filets, Steaks	75,013	11,445	15%
Fish Sticks, Portions	19,937	10,389	52%
Shellfish (except canned)	82,422	12,144	15%
Canned Seafood Products	69,746	19,402	28%
Cured Seafood Products	6,978	2,006	29%
Total	344,690	71,341	21%

Whole Fish

Only about 20% of the fresh or frozen whole fish that Canada imports from the United States is re-sold "as is" to retail or food service channels. The balance is imported by Canada's fish processing establishments as "raw material". After processing, such imports are no longer tracked separately, and are more likely than not to end up as a Canadian export product.

It cannot be readily determined from the data at hand whether any specific species of fish imported from the U.S. is unavailable from other sources and therefore, more apt to by-pass the Canadian processors and yield higher margins. Rather, the percentage of any specific imported species that is re-sold "as is" to the retail channel is apt to vary seasonally or with supply & demand.

Virtually all of the fresh or frozen cod that Canada imports is imported from the United States. The same is true for fresh or frozen salmon, frozen tuna, fresh herring, and fresh halibut. Accordingly, U.S. exporters will feel virtually the full benefit of increases in demand, and suffer the brunt of decreases. The demand for cod is declining dramatically, and that for fresh herring somewhat. On the other hand, demand for fresh or frozen salmon is increasing dramatically, as is that for fresh halibut.

Filets & Steaks

Fresh and frozen filets and steaks from the U.S. have captured about 15% of the domestic consumption market:

	Fish Filets, Steaks, Fresh			Fish Fillets, Steaks, Frozen		
FC 2002	Tonnes	ASP	Cdn$ (000)	Tonnes	ASP	Cdn$ (000)
Values	5,107	$6.98	$35,644	6,338	$4.86	$30,825
CGR%	41.5%		46.9%	11.0%		12.2%

For 2002, the demand for fresh fish filets is expected to increase 18% by volume, and 22% by value. Frozen fish filets volume is expected to increase by 12% as compared to 2001, and value by 20%.

Fish Sticks, Portions

More than 50% of the fish sticks and prepared fish meals consumed in Canada originated in the United States.

	Fish Sticks			Prepared Meals		
	Tonnes	ASP	Cdn$ (000)	Tonnes	ASP	Cdn$ (000)
Values	1,413	$4.08	$5,764	8,976	$4.18	$37,501
CGR%	9.4%		5.6%	16.7%		17.2%

For 2002, the demand for fish sticks is expected to remain flat or even decline somewhat. Prepared meals, on the other hand, are expected to increase by 8% by volume, and 5% by value compared to 2001.

Shellfish (except canned)

Fresh or frozen shellfish imported from the United States (excluding Lobster, discussed previously) are estimated to account for 15% of Canadian domestic consumption:

Exporters from the United States have captured more than 80% of the import market for fresh crab, fresh & frozen oysters, fresh scallops, fresh mussels, and live, fresh molluscs NES. Fresh crab imports for 2002 are expected to be up 20% over 2001. The market for fresh & frozen oysters is flat, or even declining slightly. The market for fresh scallops is growing about 12% by volume, but 20% by value. However, the market for frozen scallops is off significantly. 2002 FC imports of fresh mussels will be up about 12% from 2001 levels, and imports of fresh molluscs NES are flat in volume but will be up nearly 18% in value. By and large, U.S. exporters appear to be holding their market share, which means that they will capture the lion's share of the expected increases in volume and value.

However, by far the largest segment in this market is that for shrimp & prawn, shelled or not, frozen, which by value, accounts for more than 70% of Canada's imports and is expected to grow by 13%. Imports from the United States account for only about 5% of this market, and although the Country's market share is holding, there would seem to be opportunity to capture share from Thailand, and other competing sources for these products.

Canned Seafood Products

Nearly 30% of the canned seafood products consumed in Canada are sourced from the United States. Canned, salmon, shrimp & prawns represent 90% the volume consumed. Canned salmon is, by far, the dominant product in this category, and the U.S. market share of canned salmon imports is 90%:

	Salmon			Shrimp And Prawn		
FC 2002	Tonnes	ASP	Cdn$ (000)	Tonnes	ASP	Cdn$ (000)
Values	15,617	$5.95	$92,933	1,941	$9.20	$17,850
CGR%	12.0%		20.3%	-6.4%		-9.4

For 2002, the demand for canned salmon is expected to increase 14% by volume, and 21% by value. Canned shrimp & prawn volume is expected to increase by 5% as compared to 2001, and value by 1%, but U.S. exporters are expected to lose market share and experience a decline in demand.

Cured Seafood Products

About 30% of Canadian consumption of cured seafood products is salt cod from the United States. The U.S. has about 50% share of Canadian imports of light & heavy salted cod. However, the fastest growing category is dried cod, whether or not salted, where U.S. exporters have only about a 5% share of total imports. Neither is the U.S. a major player in the other categories of salted fish products that Canada imports.

RETAIL FOOD VERSUS FOOD SERVICE

The food distribution system is more structured and effective in the United States than in Canada. In particular, the essential role that food brokers play in the U.S.[4] is, in Canada, undertaken (less effectively) by wholesalers-dealers-brokers. Given the less-effective system and with the explosion of new products, private labels, and low profit margins which characterize today's environment, more and more retailers are by-passing the wholesaler-dealer and buying directly from producers. It is estimated that producers directly supply 25 to 35% of the products that retailers sell.

Similarly, the food service channel is less developed in Canada than in the United States. Canadians eat relatively fewer meals in restaurants, and well-known trends towards "ready to eat", "convenient meal solutions" or "home meal replacement" are less well-established in Canada than in the United States.

On the other hand, food service gross margins are better, and while in aggregate, the retail food sub-sector accounts for 60-65% of the Cdn$ 110 million annual retail food sales in Canada; the retail value of fish & seafood products sold through the food service channel is double that of the retail food sector. This apparent anomaly is mainly due to the high mark-ups on fish & seafood products in restaurants, as well as to the product mix[5].

Since there are approximately five times as many food service establishments as retail grocery outlets, there are more selling opportunities for processors, in particular for small- and medium-sized firms that can customize their product to the needs of their food service clients. In addition to the sheer number of selling opportunities, there are also more possibilities for non-traditional deals to be made in the food service sector than in the more traditional retail grocery channel. These include, e.g. direct contracts with end-users (particularly in the non-commercial sector), and product-trial arrangements that do not involve slotting fees. As a result of several factors[6], American exporters have a distinct advantage over exporters from other countries when it comes to penetrating the food service sector; and indeed, have done an excellent job in doing so.

In the light of these factors, assuming a suitable product(s) and U.S. food service experience, a would-be exporter to Canada should give serious consideration to targeting his introductory marketing efforts towards the food service sector.

TRENDS IN CANADA'S SEAFOOD PROCESSING[7] MARKETS

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[4] Particularly for value-added products (cold-pack and canned products)

[5] more high value-add products, more expensive species of fish, etc.

[6] e.g. geographical proximity, common language, similar culture, high number of American subsidiaries in Canada, tendency for Canada to follow trends established in the United States, etc.

[7] Includes all intermediaries between the fisherman/aqua-culturist level and retail, such as importers, exporters, wholesalers, distributors, processors, re-packagers, etc.

(Cdn$ 000)	1997	2002 FC	CGR%
Export Revenues	$3,037,600	$4,618,431	8.8%
Import Expense	$1,577,563	$2,380,144	8.6%
Gross Margin on International Trade	$1,460,037	$2,238,287	9.2%
Gross Margin %	48.1%	48.5%	
Revenues from Domestic Sales	$3,243,376	$4,912,846	8.9%
Purchases from Fishermen	$2,088,344	$3,140,814	8.7%
Gross Margin on Domestic Trade	$1,155,032	$1,772,032	9.2%
Gross Margin %	35.6%	36.1%	
Total Yearly Processor Revenues	$6,280,976	$9,531,277	8.8%
Purchases	$3,665,907	$5,520,958	8.6%
Gross Margin on All Trade	$2,615,069	$4,010,319	9.2%
Gross Margin %	41.6%	42.1%	

PROCESSORS & OTHER INTERMEDIARIES

The Canadian Seafood Industry 2002 Buyers & Industry Guide, published February, 2002 by Contact Canada[8] lists 610 companies that are active in the Canadian market, along with their location, coordinates, classification (exporter, importer, processor, wholesaler, distributor, etc.), number of employees, and sales volume. The companies listed in the Guide have reported sales revenues of $6.6 billion, indicating that more than 2/3 of the companies and revenues attributable to the sector can be specifically identified through this (free) source. Therefore, only summary information is provided below:

Processing & Other Intermediary Companies by Size Category

	Processing Firms by Number of Employees Category					
	< 9	-15	-73	-399	500+	Total
Number of Firms	313	204	174	146	21	858
Employees	1,100	3,193	8,622	27,165	28,508	68,588
Sales	$1,097,615	$1,170,773	$1,561,671	$2,463,210	$3,238,009	$9,531,278
Average # Employees	3.5	15.7	49.6	186.1	1,357.5	79.9
Average Sales / Firm	$3,507	$5,739	$8,975	$16,871	$154,191	$11,109
Average Sales / Employee	$997,832	$366,669	$181,126	$90,676	$113,582	$138,964

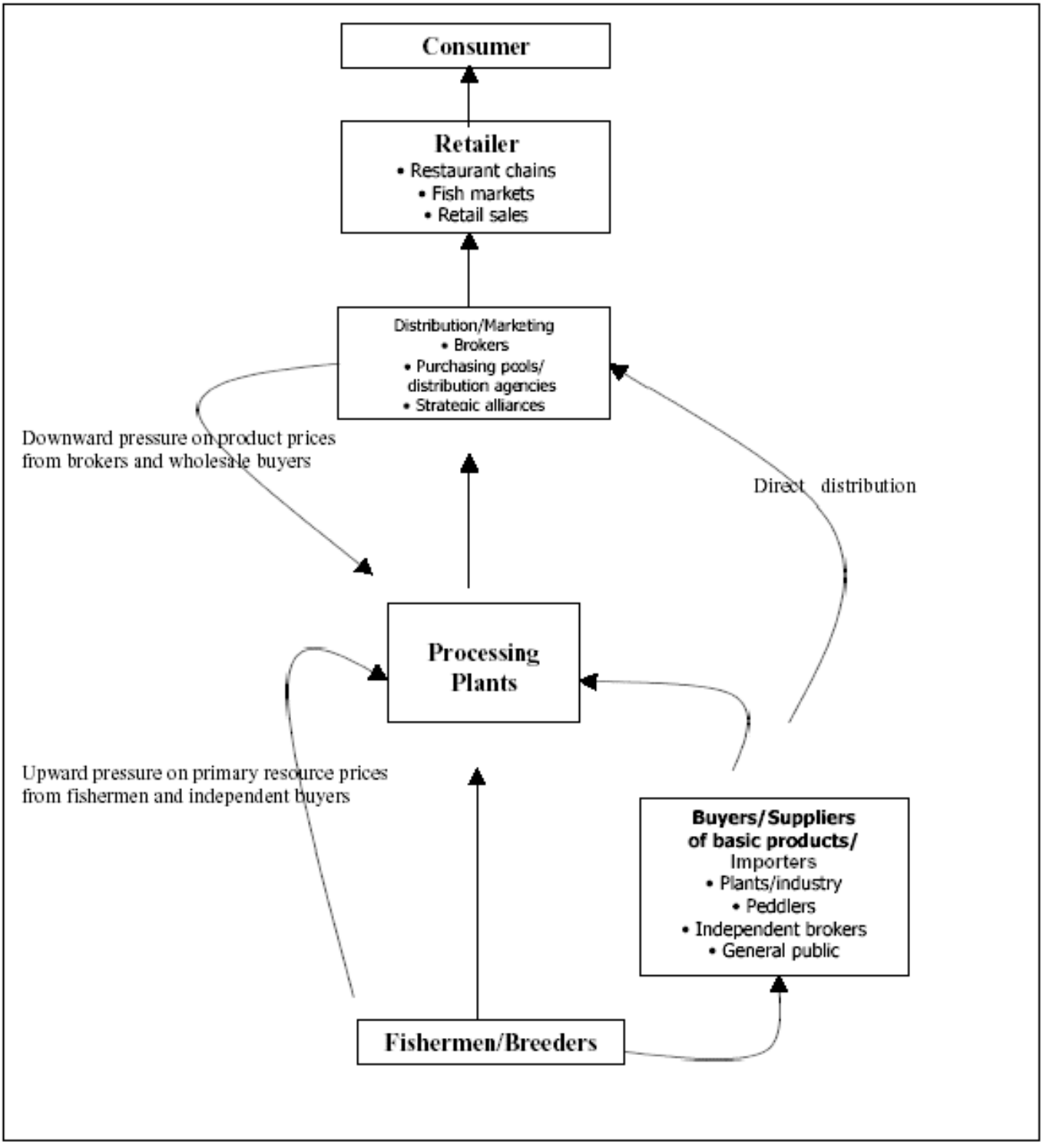
Processing & Other Intermediary Companies by Location (Province)

	Number of Firms	Employees	Sales	Average # Employees	Average Sales / Firm	Average Sales / Employee
NS	320	14,565	$2,647,671	45.5	$8,274	$181,783
NB	145	14,592	$993,949	100.6	$6,855	$68,116

[8] available at no charge, call 1-888-502-6666 or web site; http://www.contactcanada.com

PI	60	4,873	$413,057	81.2	$6,884	$84,764
QC	41	2,162	$572,001	52.7	$13,951	$264,570
NF	111	20,844	$2,163,765	187.8	$19,493	$103,808
ON	55	4,264	$1,093,708	77.5	$19,886	$256,498
MB	4	398	$112,662	99.5	$28,165	$283,069
SK	1	42	$16,894	42	$16,894	$402,237
AB	3	120	$44,628	40	$14,876	$371,902
BC	115	6,725	$1,472,872	58.5	$12,808	$219,014
Other	3	3	$70	1	$23	$23,464
Total	858	68,588	$9,531,278	79.9	$11,109	$138,964

The Reader is cautioned that the relatively high average sales per employee for the smallest companies is most likely in part an artifact resulting from under-reporting of the number of small companies, and in part reflective of the high sales - low margin business many importers/exporters are able to transact with limited headcount.



DISTRIBUTION CHANNELS FOR SEAFOOD PRODUCTS

Canadian Seafood Industry: Advantages & Challenges

Strengths & Market Opportunities	Weaknesses & Competitive Threats
Significant processing capacity	Weak profit margins throughout channel means many borderline profitable players vulnerable to insolvency or take-over
Experienced international exporters	Domestic market less attractive than export markets (may neglect home market; marketing to home market)
Weak Canadian dollar helps exports	May not have made timely capital investments in automation etc.
Low wages in Atlantic Region , for fishermen, primary processing workers	Other regions, aquaculture wages not low; sustainable through focus on high value or high value-add products
Many companies small & large, gamut of horizontal & vertical specialization and integration	Mergers & acquisitions prevalent. Some concomitant loss of expertise occurs
Parts of industry (especially front end) basically run on relationship basis rather than low-bid basis	Tight relationships of channel players may camouflage inherent weaknesses in business practices

ROAD MAP FOR MARKET ENTRY

It is difficult to describe a single best method for a new-to-market exporter to enter the Canadian market, since much depends on what type of products the would-be exporter may be handling, his location, and several other factors.

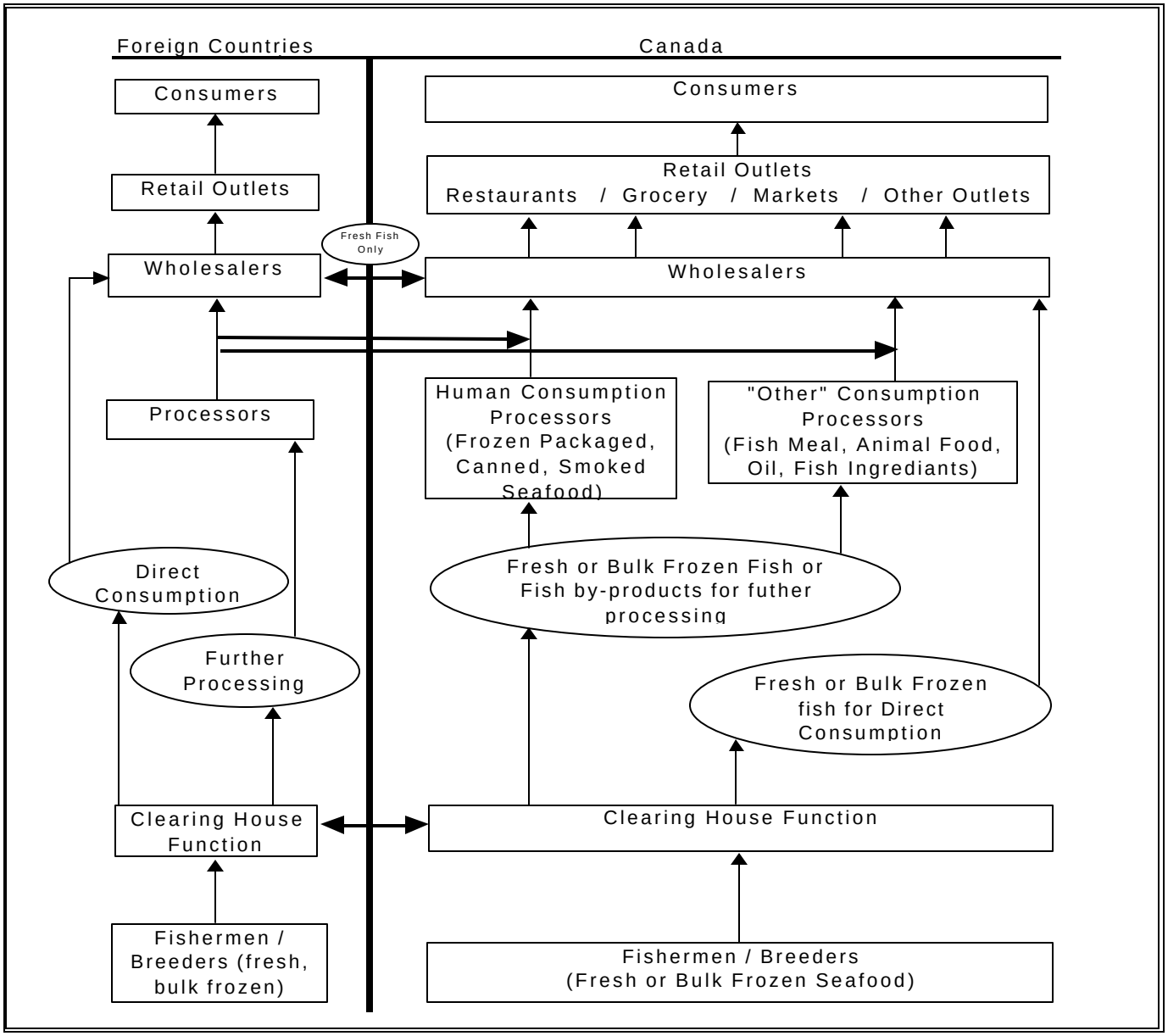
For specialized groups that focus on basic processing (fresh, chilled, and frozen), one option is to introduce their products into the channel at the same point where domestic groups do, and allow the existing intermediaries to drive the product to market. Execution of this strategy implies placing and integrating a company representative(s) at or near the dockside. The representative will be successful upon building a relationship network with the other participants in the informal "clearing house" function that Canada utilizes in lieu of an auction.

The other option for such firms is to enter the Canadian distribution channel at the wholesaler level, one step removed from retail. This approach may generate better profit margins, but it may be more difficult to develop a significant volume.

For companies that manufacture processed fish products (e.g. fish sticks, canned seafood, etc.), the most successful method of entering the market here appears to be through establishing a subsidiary or an agent in Canada. Often, it makes sense to have the Canadian entity handle packaging (from bulk product). This is because Canadian law requires bilingual packaging, and different (less onerous) disclosure information than does the United States. Furthermore, low volume packaging

runs can generally be handled more efficiently in Canada compared with a split run on a U.S. line.

The following distribution channel flow diagram illustrates the points at which U.S. products might enter the Canadian distribution channel:



Suggested Market Entry Strategies

1. Target

- Examine the product mix and select (target) a specific product that might sell well in Canada by virtue of its uniqueness or other features (Unique Selling Proposition).

- Based on proximity or other factors, select a Canadian region or city as the initial target

- Determine whether the product is to be channeled towards retail or food service end-users.

2. Explore

- If the target product is not completely new and unique[9], download historical information on U.S. exports of the targeted product to Canada from http://www.st.nmfs.gov. This information is grouped to the 6-digit HS (Harmonized System) level (or better), and is free. Download the same information on Canada's imports of the targeted product from all countries from http://www.dfo-mpo.gc.ca.

- If the 6-digit information is not specific enough, contact Statistics Canada to obtain a custom report on Canada's imports of the targeted product (1-800-294-5583 or 1-613-951-9647 or http://www.statcan.ca/english/ads/trade/custom.htm) to the 10-digit HS level. There are 195 codes, which generally means that products can be very specifically defined (type of fish, type of preparation, how packaged). The cost is incremented in groups of 25 products and by year, so e.g. the cost for an Excel spreadsheet showing Canada's imports from all countries of a group of 25 products for 1 year is about Cdn$ 350. For all products for 3 years, the cost is about Cdn$ 1,000. Statistics Canada generally takes about 10 days to generate a customized report.

- From the statistical information gathered above, calculate the average price paid for comparable imported products, convert to U.S. currency, and assess whether such a price level is acceptable.

3. Approach

- Visit potential end-users of the product in the targeted region or city to discuss their perceptions of the product/concept, and to gather relevant information about competition, pricing, etc. Find out who the end-users think would be suitable intermediaries to use in bringing this product to the market.

- Consider conducting qualitative and/or quantitative research with end-users in order to generate

[9] or if it is believed that information on a "not-new" product can provide a bellwether reading on how a new product might be expected to perform

additional information to be used both in assessing the opportunity (go: no-go decision), and in discussions with potential intermediaries.

- Hold initial meetings with potential intermediaries to discuss their interest in handling the product, their perceptions about how the market will view the product, price and volume levels, how/whether they would handle the introduction and on-going marketing required to introduce and generate uptake and use of the product.

- Conduct evaluation of cost and logistics of conforming with Canadian regulatory requirements

4. Make it Happen

- Based on information accumulated, establish volume, timing and price forecasts. Dial in extra costs for packaging, shipping, marketing, etc. Dial out fixed expenses? Make go: no-go decision.

- Establish prioritized short-list of potential intermediaries. Make appointments. Negotiate distribution agreement.

- Launch

CHANGE IN USA'S MARKET SHARE OF IMPORTS

		Increase (Decrease) in Imports			
	US Share of 2000 Imports	Total	From USA	From Other Countries	US Share of 2001 Imports
Fish, Nes	38.5%	$33,620	$18,016	$15,604	39.9%
Pollock	48.2%	$14,284	$14,706	($422)	62.0%
Crab, Snow/Queen	59.3%	$12,197	$4,694	$7,503	39.8%
Halibut	96.5%	$11,375	$11,826	($451)	98.2%
Tuna, Skipjack	1.7%	$10,626	($1,381)	$12,007	0.2%
Salmon	70.2%	$10,192	$5,883	$4,309	68.0%
Haddock	3.5%	$9,931	$430	$9,501	3.8%
Salmonidae, Nes	40.5%	$7,625	$4,050	$3,575	44.5%
Miscellaneous Products	44.8%	$7,022	$3,022	$4,000	44.4%
Shrimp, Prawn	10.9%	$6,749	($6,887)	$13,636	9.6%
Crab, King	92.9%	$5,890	$6,014	($124)	97.2%
Other Freshwater Fish	70.7%	$5,447	($359)	$5,806	46.6%
Salmon, Atlantic	91.6%	$3,970	$5,924	($1,954)	95.7%
Cod, Atlantic	21.6%	$3,815	$6,514	($2,699)	37.8%
Tuna, Albacore	89.9%	$3,525	$3,327	$198	92.2%
Other Shellfish	47.5%	$3,132	$787	$2,345	44.7%
Clam	66.9%	$2,611	($818)	$3,429	53.8%
Tuna	45.6%	$2,514	$2,324	$190	57.3%
Oyster	37.4%	$2,158	$1,609	$549	41.2%
Geoduck	100.0%	$2,090	$2,074	$16	99.9%
Sea Bass	3.7%	$1,803	$116	$1,687	5.1%
Mackerel	56.8%	$1,670	$1,070	$600	57.9%
Herring	69.1%	$1,636	$3,945	($2,309)	86.4%
Salmon, Coho	92.9%	$1,186	($641)	$1,827	69.0%
Cuttlefish	15.3%	$834	($486)	$1,320	7.7%
Carp	99.1%	$783	$799	($16)	100.0%
Crab, Dungeness	100.0%	$778	$549	$229	83.0%
Sablefish	100.0%	$587	($11)	$598	1.5%
Hake	15.5%	$513	($3)	$516	13.8%
Shark	75.3%	$268	$206	$62	75.7%
Tilapia	0.0%	$194	$39	$155	1.5%
Tuna, Yellowfin	35.7%	$138	$125	$13	39.7%
Monkfish	22.1%	$79	$387	($308)	45.6%
Halibut, Atlantic	71.4%	$54	($463)	$517	11.9%
Snails	24.5%	$34	($299)	$333	1.9%
Sardine	3.1%	($16)	$584	($600)	11.4%
Lingcod	100.0%	($20)	($20)	$0	#DIV/0!
Trout	63.4%	($22)	($526)	$504	54.9%
Tuna, Skipjack/Bonito	5.4%	($130)	$0	($130)	25.0%
Eel	30.3%	($242)	($212)	($30)	22.5%
Other Groundfish	106.1%	($258)	($446)	$188	91.5%
Dogfish	12.2%	($266)	$22	($288)	31.6%
Ocean Perch	98.6%	($300)	($255)	($45)	99.4%
Anchovy	9.7%	($567)	($21)	($546)	10.6%
Octopus	10.8%	($659)	($213)	($446)	6.8%
Mussel	15.0%	($661)	$163	($824)	18.4%
Plaice	67.3%	($771)	($470)	($301)	93.6%
Patagonian Toothfish	4.7%	($777)	$222	($999)	9.4%
Pacific Perch	2.0%	($1,151)	$23	($1,174)	65.3%
Other Freshwater Fish	8.7%	($1,720)	($217)	($1,503)	6.8%
Flatfish	22.8%	($1,759)	$48	($1,807)	37.6%
Greenland Turbot	0.1%	($1,776)	$352	($2,128)	5.6%
Salmon, Chinook (Spring)	18.9%	($1,870)	($120)	($1,750)	24.8%
Scallop	42.1%	($1,938)	$213	($2,151)	44.7%
Squid	16.4%	($2,270)	$426	($2,696)	18.8%
Sole	8.8%	($2,369)	$114	($2,483)	10.0%
Halibut, Pacific	86.4%	($4,900)	($2,190)	($2,710)	94.7%
Lobster	99.3%	($5,288)	($5,156)	($132)	99.3%
Salmon, Chum	94.4%	($5,328)	($5,853)	$525	86.3%
Lobster, Rock	2.0%	($7,484)	($465)	($7,019)	0.4%
Crab	79.0%	($7,738)	($9,818)	$2,080	68.9%
Salmon, Pink	90.5%	($9,313)	($8,369)	($944)	90.8%
Cod	62.5%	($14,808)	($6,243)	($8,565)	67.8%
Salmon, Sockeye	96.1%	($26,947)	($25,310)	($1,637)	97.5%
Grand Total	43.4%	$67,982	$23,351	$44,631	43.1%

BEST PRODUCT PROSPECTS

The Table on the previous page is intended to make it easier for U.S. exporters to Canada to identify their best product prospects. Products in the top 1/3 of the Table are those which Canada has imported in substantially greater volume (value) in 2001, as compared with 2000. Imports of products in the mid-range of the Table have remained essentially stable, while Canada has imported substantially decreased volumes (value) of those products listed in the bottom 1/3 of the Table. The import variance (increase or decrease) has been divided between the United States and all Other Counties. Finally, The U.S. market share of all imports for both 2000 and 2001 is provided, as a quick way to reference whether U.S. exporters have fared better (2001 share higher than 2000) or worse (2001 share lower than 2000) than exporters from Other Countries.

In general, products in the top 1/3 of the Table are those which have growing sales potential, and where U.S. suppliers can increase volume by either continuing to grow market share or by taking action to stem market share losses.
Products in the middle of the Table are those that have seen smaller changes in dollar volume from year-to-year, but where there may be nevertheless be opportunities to either grow market share or reverse losses. Products in the bottom 1/3 of the Table are those where Canada's overall volume of imports has declined. Prospects in this segment are likely not very good.

CONCLUSIONS

U.S. companies are already supplying more than 40% of the value of Fish & Seafood products that Canada imports every year. This is clear evidence that the Canadian market can be an attractive one for U.S. exporters. Nevertheless, a U.S. company considering exporting to Canada for the first time should be prepared to encounter lower prices and slimmer margins than might be considered normal. It should be also remembered that underlying weaknesses in the Canadian economy are, in large measure, responsible for the weak Canadian dollar; and that as a result, the margins on Canadian export business may never rival those attainable in the United States or certain other export markets.

One way to counter this potential obstacle is to view exports to Canada as purely incremental business. If overheads are already covered by a company's existing business, then any incremental business is worthwhile and profitable as long as the prices exceed the variable costs. A potential exporter would be well-advised to adopt this mind set before undertaking efforts to penetrate the Canadian market.

REGULATORY REQUIREMENTS

Comprehensive information pertaining to safety, quality, composition, labeling requirements and inspection procedures for fish & seafood products imported into Canada is available on the web site of the Canadian Food Inspection Agency (CFIA). New exporters should not be intimidated or dissuaded from investigating the possibility of exporting to Canada by the number of rules & regulations involved and the "bureaucratic legalese" in which they are presented. In fact, despite the daunting way the information is presented, most of the Canadian standards make good common sense and are not dissimilar to the standards which already govern U.S. processors.

The highlights are:

- All imports must meet Canadian quality standards and labeling regulations.
- Canadian importers of U.S. fish & seafood products must possess a Fish Import License, for which an annual fee is levied.
- Importers must provide the CFIA with written a notification providing information about each shipment prior to its receipt (or within 48 hours thereafter).
- Fees are levied on each shipment based on the declared weight and the specific type of Fish Import License held by the importer. Shipments may be subject to inspection.
- Importers are invoiced for all inspection fees on a monthly basis.
- The CFIA will take a variety of enforcement actions to counter non-compliance, including levying additional fees and requiring mandatory inspections on all shipments. Conversely, a history of full compliance with the standards generally results in fewer inspections and lower fees.

http://www.inspection.gc.ca/english/anima/fispoi/fispoie.shtml is the address of the CFIA Fish Inspection Directorate's web site. The following reference guides are available on this site:

Label Inspection Guide For Fish And Fish Products
http://www.inspection.gc.ca/english/anima/fispoi/product/labeque.shtml

List Of Canadian Acceptable Common Names For Fish And Seafood
http://www.inspection.gc.ca/bil/fishlist/canadahome.shtml

Guide To Canadian Regulatory Requirements And Examination Procedures For Imported Fish
http://www.inspection.gc.ca/english/anima/fispoi/import/guidee.shtml

Canada's National Fish And Fish Products Inspection And Control System
http://www.inspection.gc.ca/english/anima/fispoi/natcane.shtml

For answers to specific questions, would-be exporters may also contact:

Mr. G. McGregor
Manager, Fish and Fish Products
Fish, Seafood and Production Division
Animal Products Directorate
Canadian Food Inspection Agency
59 Camelot Drive
Nepean Ontario
Canada K1A 0Y9
(613) 225 2342
e-mail: gmcgregor@inspection.gc.ca

POSTSCRIPT

This Report draws heavily on statistical data and other information published by Statistics Canada (http://www.statscan.ca), Fisheries & Oceans Canada, Statistical Services Unit (http://www.dfo-mpo.gc.ca), and the U.S National Marine Fisheries Service, Fisheries Statistics & Economics Division (http://www.st.nmfs.gov). Unfortunately, some of the statistical information available from these sources is incomplete, out-dated, or contains inconsistencies which had to be resolved before this Report could be written. Accordingly, a separate Fact Book was prepared with a view to summarizing the statistical information needed for this Report into a single source document.

The information contained in the Fact Book is ultimately derived from the above-cited sources, but the anomalies found in the original sources have been rectified. Furthermore, historical data[10] was used to develop forecasts for the Year 2002 using Microsoft Excel's trend function, and these forecasts have been used throughout this Report for comparative purposes. Finally, a substantial amount of information about Canada's Seafood Exports has been included in the Fact Book.

The Fact Book on the Seafood Industry in Canada is available in PDF format only, from the following web site: www.usembassycanada.gov . Click Embassy Ottawa, Embassy Offices, US Department of Agriculture, Foreign Agricultural Service, Hot Topics.

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Related FAS/Ottawa reports:

[10] Some of which was available through the Year 2001 and some of which was not

AGR#	Title of Report	Date
CA9016	Marketing In Canada	2/18/99
CA9142	Western Canada Retail Study	12/23/99
CA0001	Eastern Canada Retail Study	1/5/00
CA0047	HRI Foodservice Sector - Eastern Canada	4/19/00
CA0082	Canada Connect (Matchmaker Program)	6/26/00
CA0127	HRI Foodservice Sector - Western CA	8/25/00
CA0135	Private Label Grocery Opportunities	9/11/00
CA0174	Pet Food Industry Product Brief	11/6/00
CA1002	Grocery Innovations Canada	01/04/01
CA1054	SIAL Montreal 2001 Evaluation	04/02/01
CA1058	Grocery Showcase West 2001- Evaluation	04/02/01
CA1059	Canadian Food & Beverage Show 2001 - Evaluation	04/02/01
CA1093	Canadian Taste for Imported Beer, Wine and Spirits	07/05/01
CA1099	Canadian Food Brokers	07/18/01
CA1126	Exploring Canada's Food Manufacturing Industry	09/18/01
CA1128	Wine & Spirits Promotional Opportunities	9/19/01
CA1130	Food & Beverage Promotional Opportunities	9/20/01
CA1131	Nursery Product Promotional Opportunities	9/20/01
CA1161	Canadian 2002 Foodservice Sales Forecast	11/16/01
CA2001	Organic Food Industry Report	01/04/02
CA2002	Convenience & Non-Traditional Grocery Outlets Report	01/04/02
CA2021	Quebec as a Market for U.S. Wine	03/05/02
CA2048	Kosher Foods Market	04/30/02
CA2078	An Overview of the Institutional Foodservice Market in Canada	